

Holy Trinity High School  
FY 2018-2022 Strategic Plan

**HT XXII**

Instilling the competence to see and the courage to act



# OUR MISSION AND VISION

## Our Mission

Holy Trinity High School, a Catholic school in the Holy Cross tradition, challenges and nurtures students academically, spiritually and personally, as they prepare to lead lives of leadership and service.

## Our Vision

We educate the hearts and minds of a richly diverse community of students, united by belief in the Holy Cross values of:

**Discipline:** Holy Trinity students are responsible, respectful, and diligent in working to achieve their goals.

**Integrity:** Holy Trinity students are honest, they take ownership of their actions and academic work, and they follow through on their commitments.

**Excellence:** Holy Trinity students exemplify a tireless desire to achieve to the best of their God-given abilities and talents.

**Family:** Holy Trinity students treat each other as brothers and sisters in Christ, communicating openly, and acting with each other in mind.

**Zeal:** Holy Trinity students live passionately, inspired by their faith and willing to lead others in the pursuit of justice.



**Entering into its 107<sup>th</sup> year**, Holy Trinity can look to its past with pride and toward its future with confidence and excitement. For over a century, Holy Trinity has provided a quality Holy Cross education by educating the hearts and minds of teenagers from all parts of the city of Chicago.

Regardless of social or economic background, the Brothers of Holy Cross set a standard of education that formed students into men and women of confidence, leadership and service. Following the educational framework of our founder, Blessed Fr. Basil Moreau CSC, the school has endured the challenges of time through continual improvement and growth. Holy Trinity remains an institution that cares for and respects each student by offering an environment that fosters both academic and personal growth. In addition to academically talented students, we serve those who score below the 50th percentile and have the desire to succeed, but may not have had the same opportunities. Our individualized approach to learning allows each student to learn, grow and succeed.

Within the last 30 years, the school has undergone great transformation: becoming a co-educational institution in 1985, moving to a dynamic sponsorship model between the Brothers of Holy Cross and the Board of Trustees in 2005, and establishing a strong network of financial support that has led to over \$5 million in school renovations and academic, spiritual and co-curricular growth.

Continuing its effort for improvement, in 2012, the school entered into a five-year strategic plan that emphasized enrollment and fundraising. In 2013, Holy Trinity engaged the services of the Alliance for Catholic Education (ACE) at the University of Notre Dame for a Marketing and Enrollment Assessment. Responding to the challenges of these projects, Holy Trinity's most recent accomplishments include:

- Curriculum and graduation requirements that correspond to what colleges and universities are looking for in high school graduates
- Higher-level academic rigor in the forms of new Advanced Placement courses, specialized standardized test preparation and improved ACT scores
- A Business, Science, Technology, Engineering and Math (B-STEM) Honors Program, which has garnered recognition locally and nationally
- A strong arts program, with higher-level art classes, two levels of band and a burgeoning theater group
- Increased fundraising in four consecutive years surpassing the goals in the Strategic Plan, which included a 10-percent annual growth in fundraising
- Increased enrollment for four consecutive years, ahead of the pace called for in the Strategic Plan
- Increased retention rates, now above 70 percent
- Citywide media attention for academic and extra-curricular accomplishments

As we move forward, looking to 2022 and beyond, we seek to position Holy Trinity as the model in Chicago for an academically rigorous, spiritually enriching high school option that offers a valuable education at an affordable price. To solidify our place as a leader in the Catholic high school market in Chicago, we will rely on this strategic plan to guide us through the next five years.

# HT XXII OVERVIEW

Strategic Plan HT XXII is intended to guide Holy Trinity through fiscal years 2018 through 2022 by setting the standards for academics, development and enrollment. At the heart of the school's growth and success, is the commitment to Holy Cross values by the entire community: teachers, staff, parents, students, alumni, Board of Trustees, volunteers and donors. Integrity, discipline, family, excellence and zeal are at the very heart of a Holy Cross education, and they form the core of what we are called to do as leaders and educators. As we developed this strategic plan to help us engage, reinforce and inspire our community to think and act strategically, we ensured that our plans are anchored in our Holy Cross values.

Since 1910, Holy Trinity High School has striven to provide a quality education for the youth of Chicago, equally emphasizing enhancement of both the heart and the mind, and opening educational opportunities for all deserving students. In 2022, Holy Trinity will continue that same mission. As we seek to gain wider recognition throughout the Chicago marketplace and develop substantial resources to support our planned growth, academic enhancements and support for all our students will remain our top priority.

As we accomplish our strategic vision, Holy Trinity High School will excel in educating men and women to be faith-filled, service-oriented, creative leaders of tomorrow. In 2022, Holy Trinity High School will serve an enrollment of 400 students who desire a Catholic education. These students will possess a deep appreciation for the opportunities presented by a Holy Trinity education. They will contribute to the school environment through their academic performance, their resiliency and belief in themselves, their ability to lead and be a positive influence on others, their devotion to creating a better future and their potential to develop their individual talents both inside and outside the classroom. As we envision Holy Trinity in 2022, we are focused on five pillars to success, Teaching & Learning, Leadership, Identity, Enrollment & Marketing, and Resources, and specific goals within those pillars:

## 1 Teaching & Learning

1. Build persistence by strengthening student attitudes toward success, learning and positive school culture.
2. Improve reading and ACT scores to bring students up to or above the national average
3. Prepare students to successfully matriculate to, and graduate from a college or program of their choice.
4. Continue to develop the B-STEM initiative into one of Chicago's premier innovative programs.
5. Create a technologically advanced environment to best equip our students with 21st century skills.

## 2 Leadership

1. Foster an environment that encourages faculty and staff to develop leadership and teaching skills that will better support the academic and co-curricular needs of our students.
2. Enhance opportunities for students to develop as leaders.
3. Strengthen the Board of Trustees and Advisory Council's procedures and practices.
4. Create a succession process for school leadership.

### 3

## Identity

1. Strengthen Holy Trinity's identity as a Catholic, Holy Cross school.
2. Advance the mission of the Brothers of Holy Cross through an enhanced campus ministry program.

### 4

## Enrollment & Marketing

1. Achieve and maintain an enrollment of 400 students.
2. Increase knowledge of Holy Trinity's value proposition through one-on-one relationships with key influencers.
3. Increase marketplace awareness by employing a variety of marketing tactics that will promote Holy Trinity's word-of-mouth campaign.

### 5

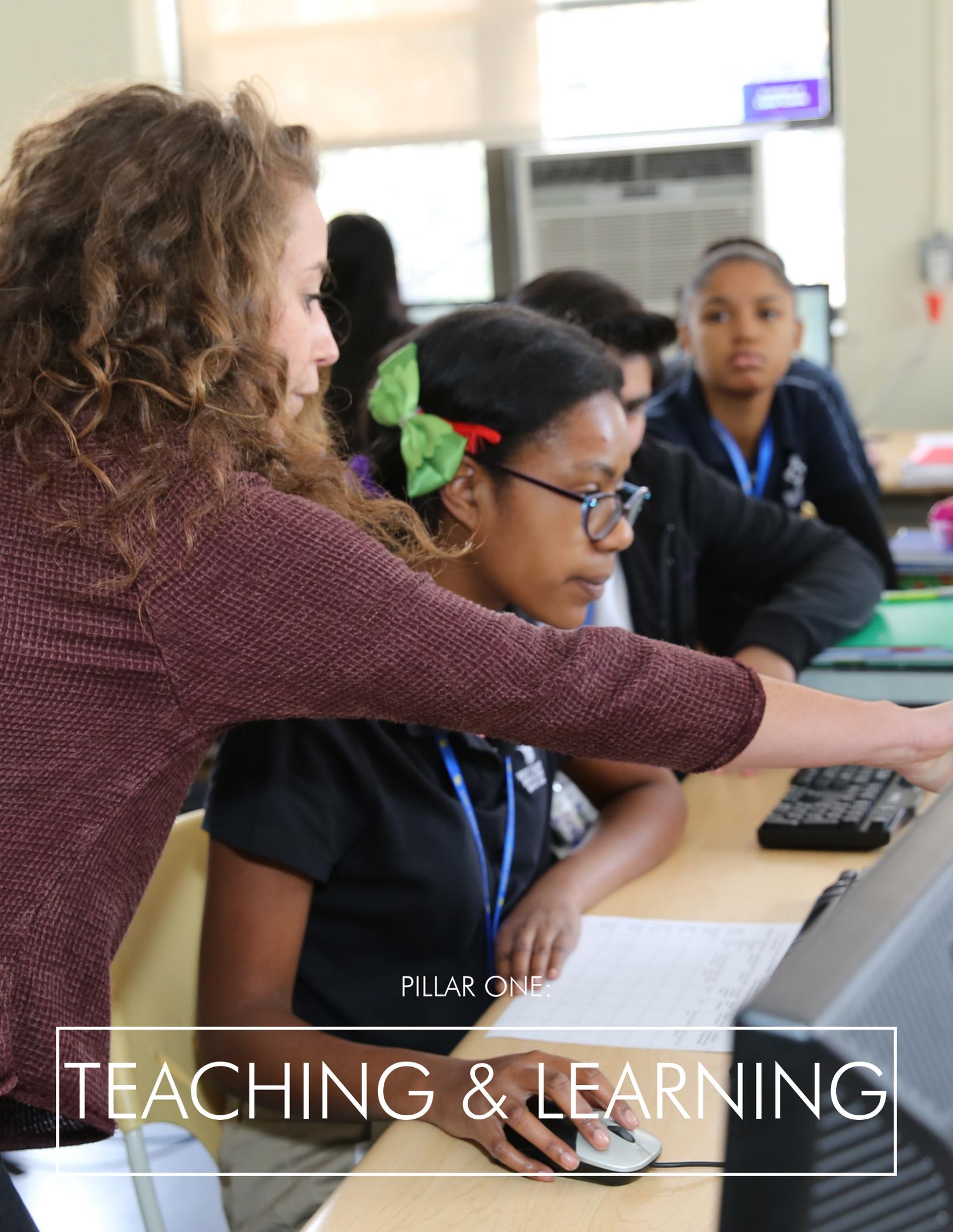
## Resources

1. Raise the necessary funds to support the school's continued growth and execute the projects called for in this plan.
2. Diversify giving options and funding sources.
3. Continue to develop the alumni network into an active constituency group that effectively engages all generations of Holy Trinity alumni.
4. Maintain a welcoming, appealing, safe and technologically advanced environment.

## WHAT DOES A HOLY TRINITY STUDENT LOOK LIKE?

In 2022, as we develop a student body comprised of students with a strong desire to be at Holy Trinity and who will fully utilize the resources for success made available through an HT education, **each Holy Trinity student should have a combination of at least two of these qualities:**

1. **Academically engaged:** Consistent quality effort evidenced by good grades (As and Bs), strong standardized test scores (60th percentile on Entrance Exam), positive teacher evaluations.
2. **Untapped potential:** Demonstrated skill or desire that are not readily apparent by report cards or other common educational markers.
3. **Work ethic:** Demonstrated resiliency and strength in believing in himself/herself and not deterred by circumstances out of their control.
4. **Commitment:** Devotion to service, special programs or employment.
5. **Leadership:** Ability to be a positive influence on others (peers, siblings, adults).
6. **Spirit:** Wants to be at Holy Trinity and brings a strong belief in Holy Trinity, Catholic education or values-based education and is not afraid to demonstrate it.



PILLAR ONE:

TEACHING & LEARNING

# TEACHING & LEARNING

## Enhance academic performance through improved classroom strategies, attitude and technology.

Holy Trinity must foster learning for all members of its community; therefore, we begin our strategic plan with academics. A Holy Trinity education transforms those who engage in it; this education forms both the mind and the heart, as well as prepares students for the 21<sup>st</sup> century.

Our goal is to ensure that all students have the opportunity to attend and successfully complete college, therefore we must reinforce the skills necessary to do so. Keys to this are higher ACT scores and improved reading skills. The faculty and administration have spent two years examining both formative and summative student data and observing characteristics that are most important to students' success. First, they have determined that reading is the skill most vital to success in all disciplines. Our students come with a wide range of skills, and while our top quartile is well above the national average, many students currently fall below grade level in reading and below the national average on the ACT. Second, clearly defined goals, a positive attitude, and persistence when work is challenging are necessary elements for long-term success. To have the greatest impact, students and parents must be part of the process of defining the goals and characteristics they wish to develop and support. Finally, in the 21st century, the world has become dependent on rapidly changing forms of technology for success in college and the workforce, as well as society at large. Directly addressing the appropriate and creative uses of technology is essential.

### ATTITUDE

#### 1. Build persistence by strengthening student attitudes toward success, learning and positive school culture.

Strategy A: Delineate the values, attitudes, and practices that are key to being a successful HT student, utilizing Blessed Fr. Basil Moreau's vision and language as the core. [FY18]

Strategy B: Implement a program of personal goal setting for students. [FY19]

Strategy C: Develop events that cultivate a positive school environment and grow school spirit. [FY18]

Strategy D: Provide one-on-one mentoring for struggling students to ensure academic success for all students. In conjunction with the development of alumni leadership opportunities identified in the Leadership Pillar, seek mentors through the alumni network, as well as Board of Trustees and strategic and corporate partnerships. [FY19]

#### MEASURES:

Survey students and parents annually on point of view and attitude to continue to measure success and identify areas for growth.

### APTITUDE & SKILLS

#### 2. Improve reading and ACT scores to bring students up to or above the national average.

Strategy A: Provide teachers with the necessary tools to identify and address areas for improvement in student reading, including the addition of a reading specialist and dedicated time to work in Professional Learning Communities. [FY18]

Strategy B: Hire a tutor for the Resource Learning Center (RLC) who can provide increased support, especially for students of English as a Second Language (ESL), to supplement the Title I reading teacher. [FY18]

Strategy C: Embed more Next Generation Science Standards and ACT standards in class content. [FY19]

Strategy D: Identify resources that make supplemental ACT prep available to all students, and build ACT prep into schedules for all juniors. [FY19]

Strategy E: Increase support for students with Individualized Learning Plans (IEPs) and ESL needs through additional specialized staffing. Potential resources include support available through Chicago Public Schools and the Office of Catholic Schools, as well as the United Stand program for diagnostics and academic counseling for students with special needs. [FY18]

### **MEASURES:**

Improve reading scores by five points or 15 percent and improve ACT scores by four points over four years in order to bring students up to or above the national average. Measures will include national standardized tests such as STAR Reading, NWEA Map tests, and ACT, as well as overall student performance on formative and summative assessments.

### **3. Prepare students to successfully matriculate to, and graduate from a college or program of their choice.**

Strategy A: Provide students with the tools to understand their strengths and weaknesses and align their goals with colleges/universities and programs that fit their needs. Utilize the college and career readiness program, Naviance, to align student strengths and interests to postsecondary goals. [FY19]

Strategy B: Building upon the work done with Big Shoulders Fund and the National Student Clearinghouse, develop a systematized process for tracking college matriculation and successes in college and beyond. [FY20]

Strategy C: Develop the College Visit Program to assist all students in the exploration of broad college opportunities. [FY18]

Strategy D: As enrollment grows, continue to expand counseling and college-readiness services, culminating in the addition of a counselor, with particular focus on college planning and persistence. [FY22]

### **MEASURES:**

Survey students and parents annually on point of view and attitude to continue to measure success and identify areas for growth.

## **CURRICULUM**

### **4. Continue to develop the B-STEM initiative into one of Chicago's premier innovative programs.**

Strategy A: Develop the Capstone Project to provide students the opportunity to perfect and showcase the critical thinking skills developed throughout the program. [FY18]

Strategy B: Continue to expand course offerings that incorporate critical thinking and creativity and align with what is next on the university and workforce landscape with guidance from our university and corporate partners. [FY18]

Strategy C: Leverage the benefits of B-STEM for more students by increasing enrollment in individual B-STEM courses by all students, while maintaining the identity of the honors program. [FY19]

Strategy D: Enhance student learning through strategic partnerships with institutions and corporations that can provide our students with "real world" experiences and opportunities outside of the classroom. [FY18]

### **MEASURES:**

- Ten percent of the graduating class matriculates with an honors diploma from the B-STEM Honors Program
- Growth of interest and enrollment in B-STEM courses by students not part of the honors program

## TECHNOLOGY INTEGRATION

### 5. Create a technologically advanced environment to best equip our students with 21st century skills.

Strategy A: Develop a technology plan that encompasses the implementation of a 1:1 technology plan and addresses hardware, software and student access to technology through the work of a Technology Plan Committee. [FY18]

Strategy B: Adopt teaching strategies that incorporate technology and build on technological skills. Provide devices and professional development for teachers, with an emphasis on teaching strategies that incorporate technology such as blended learning, flipped classrooms, and collaboration and communication. [FY18]

Strategy C: Develop and implement training for students that supports the positive use of technology as a tool for creativity, communication and learning. [FY18]

#### MEASURES:

- Evaluate the research and recommendations of the Technology Committee.
- Implement some form of 1:1 program based on the Committees recommendations.
- Increase the percentage of teachers and lessons that incorporate technology and reduce the number of traditional textbooks required for classes by supplementing technology based resources.

## MAJOR INITIATIVE : MISSION INTEGRATION

Holy Trinity's commitment to shaping young men and women instilled with the competence to see and the courage to act are best reflected in our commitment to our five Holy Cross values: Discipline, Integrity, Excellence, Family and Zeal. As we seek to build our students' attitude and aptitude, we will begin by examining and adapting the language we use to define each of these values.

We will work with a variety of constituency groups including Parent Club, Student Government Association, Link Crew, alumni and mixed-level focus groups to identify the values, attitudes, and practices that they recognize as important to being a successful HT student. The Mission Integration Committee and a team of faculty and administrators will then incorporate student and parent feedback into development of a clearly delineated outline of "The HT Way to Success"

utilizing Moreau's vision and language as it's core.

Through the HT Way to Success we seek to enhance the students' ability to identify with each Holy Cross value, understand the relevance of these values in their lives, and to more closely align our own language with the language of our founder, Blessed Fr. Basil Moreau. As outlined in the Identity pillar, purposeful implementation of the Holy Cross charism will be of the utmost importance throughout this strategic plan as we seek to both enhance our students' experiences and distinguish ourselves in the Catholic high school landscape.

As a school, we will focus on a certain value each school year to emphasize its importance in the development in the hearts and minds of Holy Trinity students.



PILLAR TWO:

# LEADERSHIP

# LEADERSHIP

**Develop potential in students, faculty, administration and board today to secure a bright future.**

Our mission calls us to develop students into young men and women instilled with Holy Cross values and leadership skills that, in the words of Blessed Fr. Basil Moreau, will “contribute to prepare the world for better times than ours.” This includes community involvement and service, which not only reinforce the Holy Cross approach to educating both the heart and the mind, but also increase our students’ appeal as well-rounded individuals when applying to colleges, universities and careers. This intensive, individualized work requires highly skilled and passionate administrators, teachers, board members, and staff members. In order to develop student leaders, we must constantly foster leadership skills in our board, faculty and staff.

Over the next five years, we will strive to cultivate an environment of leadership, diversity and empowerment that begins with our faculty, staff and board members, which will in turn create new opportunities for students to hone their leadership potential. Of the utmost importance is attracting, supporting and maintaining a diverse and talented faculty and staff, providing the students with high-quality academic support and role models with whom they can identify.

## FOSTERING LEADERSHIP AND SERVICE

### 1. Foster an environment that encourages faculty and staff to develop leadership and teaching skills that will better support the academic and co-curricular needs of our students.

Strategy A: Transition current assistant principal role into two positions of Assistant Principal for Technology Integration and Assistant Principal for Curriculum. [FY18]

Strategy B: Strengthen the faculty compensation model in order to both attract new talent and retain our existing high-performing teachers. [FY18 & FY21]

### 2. Enhance opportunities for students to develop as leaders.

Strategy A: Create a mentor program, as described in the Teaching and Learning Pillar, that matches current students with Holy Trinity alumni, board members and other role models. [FY19]

Strategy B: Increase opportunities for students to provide input on school-related issues that affect their education and school environment. [FY18]

Strategy C: Expose students to diverse mentors, role models, and ideas reflective of the mission, values, and traditions of the Brothers of Holy Cross. [FY19]

#### MEASURES:

- Number of students paired and actively engaged with a mentor
- Number of opportunities for students to provide input

### 3. Strengthen the Board of Trustees and Advisory Council’s procedures and practices.

Strategy A: Develop a succession process for board leadership, including Board Chair and other officers, as well as committee chairs, under the direction of the Board Development Committee. [FY19]

Strategy B: Develop and implement strategies to increase engagement of Advisory Council members. [FY19]

Strategy C: Evaluate and update Board of Trustee by-laws and orientation processes. [FY20]

Strategy D: Align with local business, with a special emphasis on minority-owned businesses, in order to foster potential board relationships. [FY18]

#### **MEASURES:**

- Number of Advisory Council members involved on board committees or with special initiatives
- Number of relationships created with local businesses

#### **4. Create a succession process for school leadership.**

Strategy A: Respond to changing nature of the school community by evaluating, revising and communicating its administrative structure through the work of a Succession Plan Committee. [FY20]

Strategy B: In partnership with local universities, identify programs which prepare faculty and staff for future leadership. [FY19]

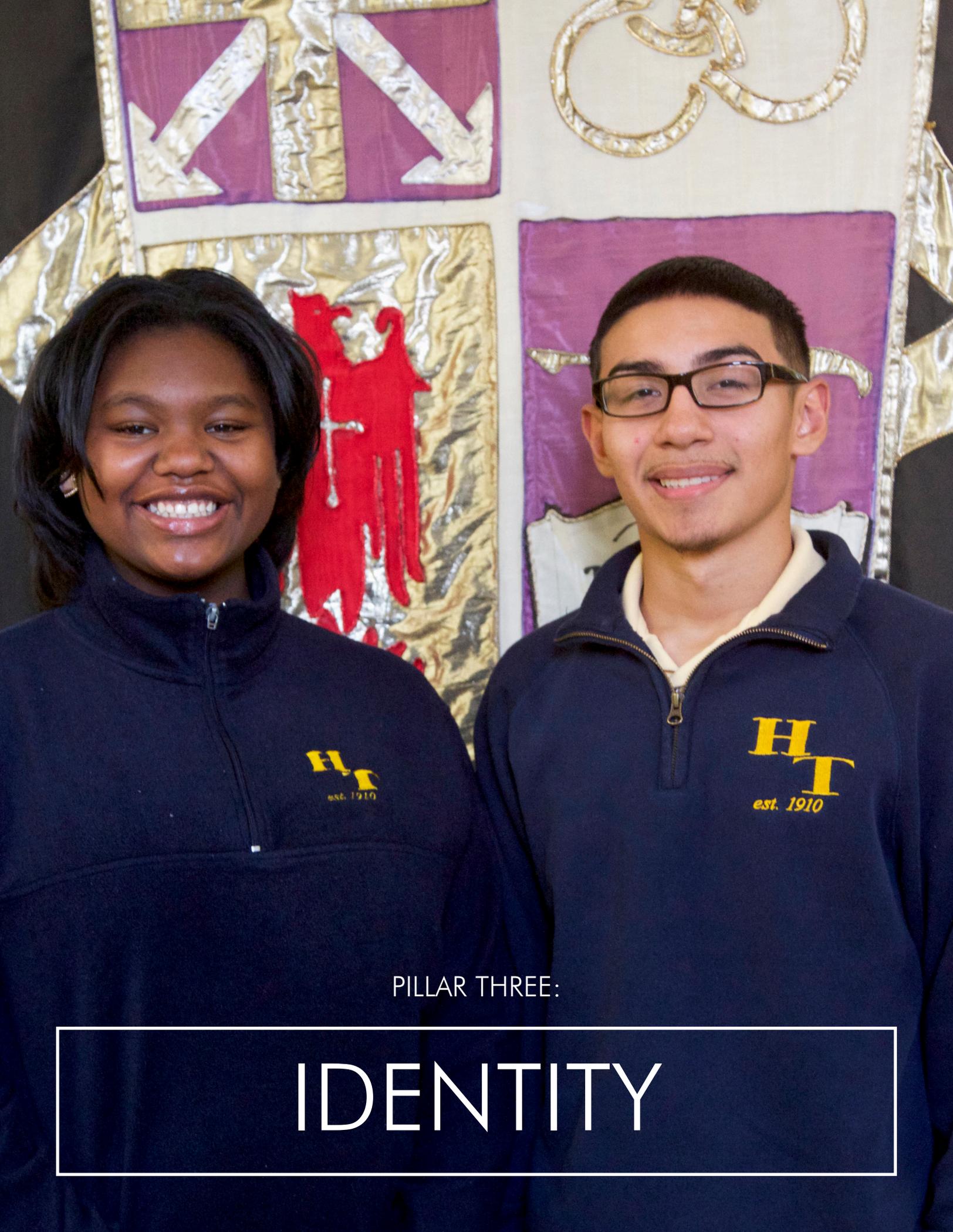
### **MAJOR INITIATIVE : DISTINGUISHED LECTURE SERIES**

As we seek to expose students to a diverse group of role models, Holy Trinity will establish a lecture series that features outside speakers from a variety of backgrounds and experiences. This effort will be led by the board's Education Committee. Under their leadership, the lecture series will highlight notable Holy Trinity alumni, board members, community leaders, members of the Congregation of Holy Cross and public figures.

Through this lecture series, our students will have the opportunity to learn from great minds outside of the classroom. They will be able to broaden their knowledge of topics ranging from local issues to global politics and more. The lecture series will provide an avenue for teachers and

students to discuss topics not typically covered in the curriculum and open the door to elevated discussion.

In addition to providing our students with a unique learning platform, the lecture series will also serve as an avenue for gaining recognition throughout Chicago. By bringing recognizable figures to speak at Holy Trinity, it will provide an opportunity to invite members of the media to the school. The lecture series will serve as a gateway to sharing the Holy Trinity story through the media. The series also provides opportunities for donor cultivation and fundraising through sponsorship of each lecture.



PILLAR THREE:

# IDENTITY

# IDENTITY

## **Build upon our Catholic, Holy Cross values to enhance the Holy Trinity experience and to differentiate ourselves in the Chicago marketplace.**

As a Catholic, Holy Cross high school, Holy Trinity is guided by traditions and charism that unite a network of schools and individuals across the nation and the globe. At the heart of the mission of the Brothers of Holy Cross and of Holy Trinity is the dedication to developing the student as a whole person, to educating both the heart and the mind. By drawing on our centuries-long Holy Cross traditions, and emphasizing our position as one part in a body of supportive Holy Cross schools, we hope to build our community internally and enhance our public perception and visibility.

### **HOLY CROSS CONNECTION**

#### **1. Strengthen Holy Trinity’s identity as a Catholic, Holy Cross school.**

Strategy A: Position Holy Trinity as the center for Holy Cross activities by building relationships with alumni of other Holy Cross schools. [FY18]

Strategy B: Explore opportunities for increased interaction with other Holy Cross high schools in the Midwest Province. Possibilities include athletic tournaments, student conferences, and alumni events. [FY19]

Strategy C: Strengthen the faculty and staff orientation segment that introduces all new employees to the history and charism of the Brothers of Holy Cross. [FY18]

Strategy D: Form a Mission Integration Committee, to be chaired by Br. James Van Dyke, CSC, to examine ways in which Holy Cross identity can be incorporated in the curriculum and student life. Utilize the Holy Cross resources available through the Midwest Holy Cross Province to ensure that Holy Cross resources are available to all community members. [FY18]

#### **2. Advance the mission of the Brothers of Holy Cross through an enhanced campus ministry program.**

Strategy A: Increase the role of Campus Minister, reducing the attendant teaching load when possible. [FY20]

Strategy B: Continue to develop the Christian Service Learning program. [FY18]

Strategy C: Enhance the role of Peer Ministers to increase efforts related to community service, school masses and prayer services, and bringing the spirit of the Brothers of Holy Cross to life at Holy Trinity. [FY18]

### **MAJOR INITIATIVE : BRINGING HOLY CROSS TO LIFE**

As the Mission Integration Committee seeks ways to incorporate the charism and traditions of the Brothers of Holy Cross into the daily life of Holy Trinity community members, an important component of this effort will be visual representations of the Congregation throughout the building. The display of Holy Cross symbols and artwork in the hallways, classrooms and other areas of the building will help to emphasize the importance of the Holy Cross charism in a Holy Trinity education.

To reinforce the presence of Holy Cross in the

students’ everyday lives, we will install two major visual representations. A Holy Cross and Holy Trinity visual time line will serve as a reminder of the longstanding commitment of the Brothers to educating the hearts and minds of young people. A world map marking the location of each Holy Cross school will help to remind students of the global reach and inner-connectedness of their Holy Cross education. In addition to these large installations, we will incorporate Holy Cross artwork and symbols in other ways into the classrooms and offices throughout the school.



PILLAR FOUR:

# ENROLLMENT & MARKETING

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**Sustain increases in quality enrollment through an individualized approach to relationship building and increased market awareness.**

A major focus over the next five years must be on recruitment, with the goal of reaching a consistent enrollment of 400 students. This is achievable through high freshman recruitment goals, as well as continuing strong retention and transfer student enrollment trends established in the last five years. Through our enhanced recruitment efforts, we hope to both identify and attract students who will succeed at Holy Trinity. Based on the findings of the ACE report, there is a largely untapped pool of prospective students who could be interested in Holy Trinity as an alternative to their local public school, if they are made aware of Holy Trinity as an option.

In recent years, Holy Trinity has dedicated more funding than ever to paid advertising campaigns, including print advertisements in the Chicago Tribune and neighborhood newspapers, advertising with the Chicago Transit Authority on buses and at train stops, targeted online advertising and more. While this marketing avenue has led to broader community awareness, we learned that our most effective recruitment tools are still found in personal relationships. It is the personal connections, through current families, alumni and key influencers at elementary schools and scholarship organizations, that truly drive our enrollment. To increase awareness, Holy Trinity will focus on relationship building that leads to personalized introductions to the school, with a secondary emphasis on broader community awareness. Ever important in this effort will be the utilization of data to better understand the most valuable recruitment avenues, as well as the marketplace's perception of Holy Trinity, our academic offerings, and our value proposition.

## STUDENT BODY COMPOSITION

### 1. Achieve and maintain an enrollment of at least 400 students.

Strategy A: Build a recruitment program that reflects the individualized approach to education students receive once enrolled. [FY18]

Strategy B: Recruit students who strongly desire to be Holy Trinity students and who are positioned for success here. This effort will be supported by the Mary Raitt Opportunity Fund. [FY18-FY22]

Strategy C: Develop a plan with the Partnership to Educate and Advance Kids to best advance the mission and students of both organizations. [FY18]

Strategy D: Identify ways to continue to diversify the international student program and to be able to best serve our international students in an enhanced learning environment. Maintain an international student enrollment of 12 percent of the total student body. [FY18-FY22]

#### MEASURES:

- Meet recruitment goals set forth in Appendix A.
- Maintain a retention rate of at least 92 percent.
- Maintain an international student population of 10 percent of the total student body, and not exceeding 15 percent of the student body.

## RELATIONSHIP BUILDING & MARKET AWARENESS

### 2. Increase knowledge of Holy Trinity's value proposition through one-on-one relationships with key influencers.

Strategy A: Develop specific language to describe Holy Trinity's value proposition that can be easily shared with key influencers and prospective families. [FY18]

Strategy B: Create new and build upon existing relationships with key influencers at target and feeder schools to increase their knowledge of Holy Trinity's offerings. [FY18]

Strategy C: Enhance relationships with scholarship and youth organizations to position Holy Trinity as a top-choice for their scholars. [FY18]

Strategy D: Develop language that educates key influencers and parents on the value of a Holy Trinity education and demonstrates the importance of the family's investment in their child's education, including any increases in tuition. [FY18]

Strategy E: Utilize the Marketing Committee to conduct bi-annual perception interviews with key influencers at elementary schools and scholarships organizations to better understand Holy Trinity's image in the educational marketplace. [FY18]

#### MEASURES:

- Establish and maintain a system of tracking student success rates at Holy Trinity to better identify elementary schools from which successful Holy Trinity students graduate.
- Track retention and college matriculation for each student.
- Track number of students enrolled through relationships with key influencers at elementary schools and scholarship organizations, alumni and current families.
- Develop a schedule of beginning- and end-of-year interviews with elementary schools and scholarships organizations and document feedback.

### 3. Increase marketplace awareness by employing a variety of marketing tactics that will promote Holy Trinity's word-of-mouth campaign.

Strategy A: Utilize our parents, current students and alumni as ambassadors and advocates of the school. Continue to grow the Parent Club and give members the tools to serve as ambassadors for HT. [FY18]

Strategy B: In a marketplace that increasingly relies on online sources for information, increase social media presence and advertising, encourage engagement among all constituencies, and heighten presence on various online resources parents and students utilize to explore high school options. [FY18]

Strategy C: Build knowledge of Holy Trinity in the broader Chicago marketplace through online and print advertising, including Facebook and Google ads, CTA and local newspaper ads, as well as other avenues. [FY18]

Strategy D: Expand existing events like HT Day, Open Houses, student performances, Robofest, and summer camps for middle school students that provide opportunities for existing constituents to spread the word about Holy Trinity. [FY18]

Strategy E: Utilize videos to create messages that tell the HT story in a clear, concise way that can be easily shared online. [FY18]

Strategy F: Enhance the visual presence of the Holy Trinity campus through the addition of signage and other aesthetic enhancements. [FY19]

## MEASURES:

- Enrollment numbers of both freshman and transfer students will indicate word-of-mouth campaign success.
- Conduct focus groups with freshmen and transfer students each fall to better understand what influenced their decisions.
- Utilize website and social media analytics to measure campaign and general success.
- Poll Open House and Shadow Day attendees about how they heard of the event to help understand successful communication channels.
- Bi-annually, conduct interviews and surveys of students, parents and educational leaders, both associated with Holy Trinity and not, to gain a better understanding of Holy Trinity's market positioning. Utilize the 2014 ACE report for comparison to previous viewpoints.

## MAJOR INITIATIVE : MARY RAITT OPPORTUNITY FUND

Holy Trinity High School provides opportunities of a high quality education and extra-curricular programs for young people who otherwise would not have them. In memory of his wife Mary who believed deeply in this mission, John Raitt has established a scholarship fund, as well as an endowment, with an extraordinary two-to-one giving match.

The goal of this scholarship fund is to enable Holy Trinity to achieve full enrollment, ensuring that as many young people as possible have the opportunity for a Holy Trinity education, and to continue to build a student body of young people who want to make the most of the opportunities Holy Trinity has to offer. The Fund will be used over a period of seven years. The Mary Raitt Opportunity Fund, combined with many other financial assistance programs Holy

Trinity offers, will allow Holy Trinity to strategically recruit and support students regardless of their families' ability to pay.

Through Mr. Raitt's initial gift of \$1 million, divided evenly between the fund and the endowment, and the two-one-match, this will allow for the continued growth of the Holy Trinity student body through a unique approach to the admissions process. Holy Trinity will use the funds from this effort to develop an efficient and individualized approach to recruitment that allows us to not only identify and recruit students who will succeed at Holy Trinity, but to continue to support them through graduation and beyond. This holistic approach to each student's education genuinely reflects Mary Raitt's belief in the potential of each Holy Trinity student.



PILLAR FIVE:

# RESOURCES

# RESOURCES

## Diversify, grow and enhance funding sources and facilities.

The goals and objectives of this strategic plan are largely focused on people and programs. Achievement of these goals and objectives require a sustainable financial model. We conclude our strategic plan with the funding model that will allow the above goals to become a reality for the Holy Trinity community. Building upon the successful foundation laid over the last decade, this strategic plan calls for continued growth in our fundraising efforts.

Holy Trinity will focus on developing particular areas of fundraising and development to ensure the financial stability of the school. These areas include growth in the alumni giving program, a monthly giving program and developing new initiatives to increase the donor base and annual donations.

### FUNDING GROWTH AND DIVERSITY

#### 1. Raise the necessary funds to support the school's continued growth and execute the projects called for in this plan.

Strategy A: Continue to grow the donor base through existing fundamental pieces of our fundraising model, and educate existing donors on the importance of each: The Fund for Holy Trinity, foundations and corporate giving, scholarship organizations and the *Guardians of Hope* Dinner. [FY18]

Strategy B: Develop a plan that provides funding for anticipated and unexpected building needs within the annual school budget. [FY18]

#### 2. Diversify giving options.

Strategy A: Implement special giving campaigns to diversify giving options, including a monthly giving campaign, along with an improved online giving experience. [FY18]

Strategy B: Develop new special events targeted at specific affinity groups that complement the success of *Guardians of Hope* and provide opportunities for new donor cultivation. [FY18]

Strategy C: Continue to develop unique programs for donors to sponsor, for example, 1:1 technology program, mentoring programs, student experience programs, and an outdoor athletic facility. [FY18]

Strategy D: Grow the existing Holy Cross Endowment through the integration of planned giving into our annual fundraising efforts. The Holy Cross Endowment serves as a support system for Holy Trinity's general operating fund, complementing the Raitt Family Scholarship Fund, a permanent endowment that supports student scholarships and financial assistance. [FY20]

#### MEASURES:

- Number of monthly online donations to increase by 10 percent annually
- Increase special event revenue, in addition to *Guardians of Hope*
- Number of committed gifts to the Holy Cross Endowment

**3. Continue to develop the alumni network into an active constituency group that effectively engages all generations of Holy Trinity alumni.**

Strategy A: Establish Class Agent and Decade Captain programs to support reunion efforts, to drive annual support for The Fund for Holy Trinity, and to foster lifelong connections to Holy Trinity. [FY19]

Strategy B: Seek out successful alumni and enlist their help in preparing current students for college through events like the college fair, career fair, and interactive, informative panels. [FY20]

**MEASURES:**

- Number of alumni involved in the Class Agent and Decade programs
- Increase in number of alumni attending school events

**ENHANCED FACILITIES**

**4. Maintain a welcoming, appealing, safe and technologically advanced environment that will support the growing student population and is comparable to our competitors.**

Strategy A: Complement the building renovations accomplished during the last five years with modern bathroom facilities. [FY18]

Strategy B: Enhance the student learning experience with the redesign of the library that provides students with access to both traditional print resources and digital ones, as well as physical collaboration work spaces. [FY20]

Strategy C: Develop targeted initiatives to support specific capital improvement projects through both individual and corporate support. [FY18]

**MAJOR INITIATIVE : THE 1910 SOCIETY**

Building upon the foundation laid through the Bridge to Inspired Lives capital campaign in 2006, Holy Trinity will expand its planned giving program, the 1910 Society. The 1910 Society is an honorary society comprised of alumni, parents, friends, and benefactors who have provided for Holy Trinity in their estate plans.

As we work to further develop The 1910 Society, Holy Trinity will form a Planned Giving Committee to help take steps necessary to create a vibrant giving society that provides 10 percent of the annual revenue. Through the work of this committee Holy Trinity will continue to grow this very important giving society.

With the help Holy Trinity staff and planned

giving experts, members of the Holy Trinity community will be educated on a variety of planned giving options and why their legacy gift will help further the mission of Holy Trinity. To further the conversation Holy Trinity will host several seminars in order to ensure each member of the community fully understands the value of a planned gift, as well as produce materials that outline the details of The 1910 Society.

Through the 1910 Society, Holy Trinity will have the ability to sustain successful programs, grow our endowment, and launch major new initiatives, including ones called for in this strategic plan. The funds raised through this effort will contribute to the Holy Cross Endowment, which supports the general operations of the school.



# APPENDICES

# APPENDICES

- A. ENROLLMENT GOALS AND PROJECTIONS
- B. SUPPORTING THE PLAN
- C. FINANCIAL PROJECTIONS
- D. KEY ASSUMPTIONS

## APPENDIX A

### ENROLLMENT GOALS AND PROJECTIONS

	2017-18	2018-19	2019-20	2020-21	2021-22
<b>Class</b>					
Freshmen	93	100	100	105	105
Sophomores	78	96	104	100	106
Juniors	102	81	99	105	100
Seniors	85	95	78	92	97
<b>Average Enrollment</b>	<b>358</b>	<b>372</b>	<b>381</b>	<b>402</b>	<b>408</b>
PEAK students	42	49	56	63	70
International students	43	45	46	48	49

**Key assumptions:**

- Enrollment based on starting with a class of 93 Freshmen
- Retention of 92%
- Transfers similar to prior years mainly to the sophomore and junior classes
- Growing international students to 12% of total population

\* Any discrepancies throughout the financial projections are due to fractions in retention calculations. Based on retention calculations, all enrollment numbers have been rounded to the nearest whole number.

# APPENDIX B

## SUPPORTING THE PLAN

### Supporting The Plan Strategic Five Year Plan 2017-2022

<i>Salary Increase</i>	<b>F5% &amp;S3%</b>	<b>ALL 3%</b>	<b>ALL 3%</b>	<b>F5% &amp;S3%</b>	<b>ALL 3%</b>	
	<b>2017-2018</b>	<b>2018-19</b>	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>Total</b>
<b>Reimbursable:</b>						
1:1 Tech Program	40,000	33,000	33,000	33,000	33,000	<b>172,000</b>
Student Programing	5,000	5,000	5,000	5,000	5,000	<b>25,000</b>
M&R Personnel Expansion	20,000	20,000	20,000	20,000	-	<b>80,000</b>
Software	5,000	5,000	5,000	5,000	5,000	<b>25,000</b>
<b>Total Reimbursable</b>	<b>70,000</b>	<b>63,000</b>	<b>63,000</b>	<b>63,000</b>	<b>43,000</b>	<b>302,000</b>
<b>Salaries</b>						
Teacher	35,000	-	36,060	37,100	38,000	<b>146,160</b>
Music Teacher up to FT				13,000		<b>13,000</b>
Campus Minister		-		-		<b>-</b>
Counselor				50,000	-	<b>50,000</b>
RLC Tutor	25,000					<b>25,000</b>
IEP Spec Ed Support	-	25,000				<b>25,000</b>
Second Maint Support	30,000					<b>30,000</b>
Major Gifts Officer		50,000				<b>50,000</b>
<b>Salaries Increase</b>	<b>130,814</b>	<b>105,403</b>	<b>129,209</b>	<b>150,948</b>	<b>129,170</b>	<b>645,544</b>
<b>Subtotal</b>	<b>220,814</b>	<b>180,403</b>	<b>165,269</b>	<b>251,048</b>	<b>167,170</b>	<b>984,704</b>
<b>Benefits and Taxes</b>	<b>66,244</b>	<b>54,121</b>	<b>49,581</b>	<b>75,315</b>	<b>50,151</b>	<b>295,411</b>
<b>Total Personnel Expense</b>	<b>287,058</b>	<b>234,524</b>	<b>214,850</b>	<b>326,363</b>	<b>217,321</b>	<b>1,280,115</b>
<b>Other Initiatives</b>						
1:1 Program Support Consultant	15,000	15,000	15,000	15,000	15,000	<b>75,000</b>
Additional Marketing	10,000	10,000	10,000	10,000	10,000	<b>50,000</b>
<b>Subtotal</b>	<b>25,000</b>	<b>25,000</b>	<b>25,000</b>	<b>25,000</b>	<b>25,000</b>	<b>125,000</b>
<b>Total Operating Expenses</b>	<b>382,058</b>	<b>322,524</b>	<b>302,850</b>	<b>414,363</b>	<b>285,321</b>	<b>1,707,115</b>
<b>Capital Improvements</b>						
Bathrooms Renovation	600,000					<b>600,000</b>
Structural Repairs		50,000	50,000	50,000	50,000	<b>200,000</b>
Bus Replacement		50,000		50,000		<b>100,000</b>
Library			250,000			<b>250,000</b>
Roof					150,000	<b>150,000</b>
<b>Total Capital Improvements</b>	<b>600,000</b>	<b>100,000</b>	<b>300,000</b>	<b>100,000</b>	<b>200,000</b>	<b>1,300,000</b>
						<b>-</b>
<b>Total</b>	<b>982,058</b>	<b>422,524</b>	<b>602,850</b>	<b>514,363</b>	<b>485,321</b>	<b>3,007,115</b>

# APPENDIX C

## FINANCIAL PROJECTIONS

### Holy Trinity High School

#### Proposed Five Year Plan 2017-2022

	2017-18	2018-2019	2019-2020	2020-2021	2021-2022
	Proposed	Proposed	Proposed	Proposed	Proposed
<b>SCHOOL OPERATIONS</b>					
<i>Average Enrollment</i>	<b>358</b>	<b>371</b>	<b>381</b>	<b>402</b>	<b>408</b>
<i>Annual Tuition</i>	8,175	8,450	8,750	9,075	9,450
<b>TUITION REVENUE:</b>					
Tuition Paid by Parents	921,934	972,320	1,028,415	1,111,800	1,155,806
<b>Tuition Assistance Revenue:</b>					
Outside Scholarships	1,013,113	1,160,798	1,322,546	1,495,412	1,519,859
Peak	343,350	414,050	490,000	571,725	661,500
<b>Total Tuition Revenue</b>	<b>2,278,397</b>	<b>2,547,168</b>	<b>2,840,962</b>	<b>3,178,938</b>	<b>3,337,165</b>
<b>OTHER STUDENT REVENUE:</b>					
Fees Income: Reg. Grad. Course	127,560	137,334	138,656	145,562	147,087
Student Funding raising Events	35,800	37,116	38,064	40,168	40,791
Athletic Activities Income	16,500	19,500	23,000	26,000	29,500
Summer School/Camp	5,000	5,000	5,000	5,000	5,000
<b>TOTAL</b>	<b>184,860</b>	<b>198,950</b>	<b>204,720</b>	<b>216,730</b>	<b>222,377</b>
<b>DEPARTMENTAL REVENUE:</b>					
Food Program Reimbursement and Revenue	262,887	277,467	288,881	310,471	319,982
Retail Supplies and Spirit Wear	15,000	17,500	18,000	20,000	22,500
<b>TOTAL</b>	<b>277,887</b>	<b>294,967</b>	<b>306,881</b>	<b>330,471</b>	<b>342,482</b>
<b>MINUS TUITION COLLECTION EXPENSE:</b>					
Bad Debt - Uncollectibles	12,000	12,000	12,000	12,000	12,000
<b>TOTAL</b>	<b>12,000</b>	<b>12,000</b>	<b>12,000</b>	<b>12,000</b>	<b>12,000</b>
<b>TOTAL SCHOOL OPERATING REVENUE</b>	<b>2,729,144</b>	<b>3,029,086</b>	<b>3,340,562</b>	<b>3,714,139</b>	<b>3,890,025</b>
<b>SCHOOL OPERATING EXPENSES</b>					
<b>PERSONNEL EXPENSES:</b>					
Salaries & Stipends	2,172,332	2,264,562	2,378,703	2,564,131	2,677,315
Employee Ben & Payroll Taxes	672,624	725,132	783,781	853,054	922,178
Professional Services & Fees (Program Consultants, IT, Audit, Legal)	177,950	182,550	188,650	194,650	201,650
Professional Development Expense	3,000	3,000	3,000	3,000	3,000
<b>TOTAL</b>	<b>3,025,905</b>	<b>3,175,244</b>	<b>3,354,133</b>	<b>3,614,835</b>	<b>3,804,143</b>
<b>DEPARTMENTAL EXPENSES</b>					
Food Program	235,642	251,633	265,800	288,911	302,189
Educational Expenses	79,750	84,750	85,050	90,250	90,950
Athletics Dept Expenses	78,000	80,000	85,000	86,500	90,500
Non Taxable Consumable sold to students	12,200	12,800	12,800	13,500	14,000
<b>TOTAL</b>	<b>405,592</b>	<b>429,183</b>	<b>448,650</b>	<b>479,161</b>	<b>497,639</b>
<b>ADMINISTRATIVE EXPENSES</b>					
Recruitment and Marketing Expenses	97,750	103,250	101,750	106,250	106,250
Admin Other Expenses: Suppl.	123,882	126,264	126,538	130,149	130,329
<b>TOTAL</b>	<b>221,632</b>	<b>229,514</b>	<b>228,288</b>	<b>236,399</b>	<b>236,579</b>
<b>BUILDING &amp; FACILITIES</b>					
Building /Facilities Maint & Repairs	144,000	148,000	150,000	157,000	157,000
Utilities: Electricity, Heat, Sewer	106,650	108,250	111,250	116,750	118,750
Equipment & Mach. Oper Expense	52,700	65,600	55,600	68,500	58,500
Transportation Maint and Operation	41,800	41,300	41,300	40,800	40,800
<b>TOTAL</b>	<b>345,150</b>	<b>363,150</b>	<b>358,150</b>	<b>383,050</b>	<b>375,050</b>
<b>TOTAL OPERATING EXPENSES</b>	<b>3,998,279</b>	<b>4,197,091</b>	<b>4,389,222</b>	<b>4,713,445</b>	<b>4,913,411</b>
<b>LOSS FROM SCHOOL OPERATIONS</b>	<b>(1,269,136)</b>	<b>(1,168,005)</b>	<b>(1,048,660)</b>	<b>(999,306)</b>	<b>(1,023,386)</b>
<b>OTHER INCOME (EXPENSE)</b>					
<b>Other Income (Rent, Interest, Dividends)</b>	<b>55,750</b>	<b>60,750</b>	<b>60,750</b>	<b>62,750</b>	<b>62,750</b>
Minus : Interest, Credit Card fees	22,800	27,800	27,800	30,800	32,800
<b>Contributions for Reimbursable Expenses</b>	<b>70,000</b>	<b>63,000</b>	<b>63,000</b>	<b>63,000</b>	<b>43,000</b>
Minus Other Exp & Exp Funded by Donors	50,000	43,000	43,000	43,000	43,000
<b>Net Other Income and Expense</b>	<b>52,950</b>	<b>52,950</b>	<b>52,950</b>	<b>51,950</b>	<b>29,950</b>
<b>NET SCHOOL OPERATING LOSS</b>	<b>(1,216,186)</b>	<b>(1,115,055)</b>	<b>(995,710)</b>	<b>(947,356)</b>	<b>(993,436)</b>
<b>FUNDRAISING ACTIVITIES</b>					
<b>REVENUE:</b>					
The Fund For Holy Trinity	607,700	638,085	657,228	690,089	724,593
Foundations & Corporations	246,000	266,000	291,000	315,000	341,000
Alumni Activities	47,000	52,000	60,000	66,000	70,000
Special Events	810,000	830,000	850,000	870,000	890,000
<b>TOTAL fundraising Income</b>	<b>1,710,700</b>	<b>1,786,085</b>	<b>1,858,228</b>	<b>1,941,089</b>	<b>2,025,593</b>
<b>EXPENSES:</b>					
Fundraising Salaries and Benefits	557,651	633,541	658,094	683,928	711,137
Fundraising Other Expenses : supplies , venues, printing & postage	238,500	283,000	257,000	262,500	272,500
<b>Total Fundraising Expenses</b>	<b>796,151</b>	<b>916,541</b>	<b>915,094</b>	<b>946,428</b>	<b>983,637</b>
<b>NET FUNDRAISING INCOME</b>	<b>914,549</b>	<b>869,544</b>	<b>943,134</b>	<b>994,661</b>	<b>1,041,956</b>
<b>SCHOOL NET LOSS BEFORE H&amp;M CONTRIBUTIONS</b>	<b>(301,637)</b>	<b>(245,511)</b>	<b>(52,576)</b>	<b>47,304</b>	<b>48,520</b>

\* Any discrepancies throughout the financial projections are due to fractions in retention calculations. Based on retention calculations, all enrollment numbers have been rounded to the nearest whole number.

## Holy Trinity High School Strategic Plan Enrollment & Tuition Analysis 2017-2022

	2017-18	2018-2019	2019-2020	2020-2021	2021-2022
<b>Class/Average Enrollment</b>	<b>Average</b>	<b>Average</b>	<b>Average</b>	<b>Average</b>	<b>Average</b>
Freshmen	93	100	100	105	105
Sophomores	78	96	104	100	106
Juniors	102	81	99	105	100
Seniors	85	95	78	92	97
<b>Average Enrollment</b>	<b>358</b>	<b>371</b>	<b>381</b>	<b>402</b>	<b>408</b>
<b>Tuition Increase</b>	<b>250</b>	<b>275</b>	<b>300</b>	<b>325</b>	<b>375</b>
<b>Full Tuition</b>	<b>8,175</b>	<b>8,450</b>	<b>8,750</b>	<b>9,075</b>	<b>9,450</b>
<b>Average Annual Tuition</b>	<b>2,926,650</b>	<b>3,136,302</b>	<b>3,330,576</b>	<b>3,645,264</b>	<b>3,854,708</b>
<b>Sources of Tuition Payments</b>					
<b>Outside Scholarships</b>					
Hosinski Scholars					
# Students	45	50	55	55	55
Amount per student	4,000	4,000	4,250	4,250	4,500
<b>Subtotal</b>	<b>180,000</b>	<b>200,000</b>	<b>233,750</b>	<b>233,750</b>	<b>247,500</b>
<b>Outside Scholarships Other</b>					
Based on Historical Percentage of Scholars (63%)	226	234	240	253	257
\$3,300 per students + 60% of tuition Increase	3,450	3,615	3,795	3,975	4,170
<b>Subtotal</b>	<b>778,113</b>	<b>845,298</b>	<b>910,046</b>	<b>1,005,912</b>	<b>1,071,609</b>
<b>MR Opportunity Fund</b>					
From 20 First year to 4 Classes in 2021	20	42	65	93	73
Amount per student	2750	2750	2750	2750	2750
<b>Subtotal</b>	<b>55,000</b>	<b>115,500</b>	<b>178,750</b>	<b>255,750</b>	<b>200,750</b>
<b>Total Tuition Paid by Scholarships</b>	<b>1,013,113</b>	<b>1,160,798</b>	<b>1,322,546</b>	<b>1,495,412</b>	<b>1,519,859</b>
<i>Growth based on enrollment and additional scholarships or increments to scholarships</i>					
<b>PEAK</b>					
#Students	42	49	56	63	70
Tuition	8,175	8,450	8,750	9,075	9,450
<b>Total Peak</b>	<b>343,350</b>	<b>414,050</b>	<b>490,000</b>	<b>571,725</b>	<b>661,500</b>
<b>Tuition Paid by Parents</b>					
Average Enrollment Minus Fully Funded	235	240	239	250	249
Average per parent	2,150	2,205	2,265	2,330	2,405
<b>Subtotal</b>	<b>505,336</b>	<b>528,364</b>	<b>541,246</b>	<b>583,619</b>	<b>598,741</b>
<b>Internationals</b>					
12% of average enrollment	43	45	46	48	49
Tuition (Fees included in other student revenue)	8,175	8,450	8,750	9,075	9,450
<b>Subtotal</b>	<b>351,198</b>	<b>376,356</b>	<b>399,669</b>	<b>437,432</b>	<b>462,565</b>
<b>Tuition Paid in Full</b>					
#Students from Historical Numbers	8	8	10	10	10
Tuition	8,175	8,450	8,750	9,075	9,450
<b>Subtotal</b>	<b>65,400</b>	<b>67,600</b>	<b>87,500</b>	<b>90,750</b>	<b>94,500</b>
<b>Total Parents Contribution</b>	<b>921,934</b>	<b>972,320</b>	<b>1,028,415</b>	<b>1,111,800</b>	<b>1,155,806</b>
<b>Total Tuition Paid by Scholarships and Parents</b>	<b>2,278,397</b>	<b>2,547,168</b>	<b>2,840,962</b>	<b>3,178,938</b>	<b>3,337,165</b>
<i>Assumes parents will pay 25% of the tuition increase</i>					
<b>Financial Aid Need to be Funded by H&amp;M</b>					
Average of students who receive HTFA	205	197	196	186	259
HTFA	410,753	394,134	392,114	371,326	517,543
<b>Average Per student</b>	<b>2,000</b>	<b>2,000</b>	<b>2,000</b>	<b>2,000</b>	<b>2,000</b>
	<b>410,753</b>	<b>394,134</b>	<b>392,114</b>	<b>371,326</b>	<b>517,543</b>
<b>Feeder Scholars (Part of HTFA)</b>					
# Students (Phasing out at the end of the plan)	95	78	39	38	0
Amount	2,500	2,500	2,500	2,500	2,500
<b>Subtotal</b>	<b>237,500</b>	<b>195,000</b>	<b>97,500</b>	<b>95,000</b>	<b>-</b>
<b>Total Financial Aid to be Funded by H&amp;M</b>	<b>648,253</b>	<b>589,134</b>	<b>489,614</b>	<b>466,326</b>	<b>517,543</b>
<b>Total Tuition Sources</b>	<b>2,926,650</b>	<b>3,136,302</b>	<b>3,330,576</b>	<b>3,645,264</b>	<b>3,854,708</b>

\* Any discrepancies throughout the financial projections are due to fractions in retention calculations. Based on retention calculations, 26 all enrollment numbers have been rounded to the nearest whole number.

# APPENDIX D

## KEY ASSUMPTIONS

### TUITION

- Assuming parents will increase their contribution by 20% of the tuition increase. Excludes parents of students fully funded by scholarship partners i.e. PEAK and international students.
- Growing the number of merit-based scholars: i.e. Hosinski gradually to max 55 students
- Expanding our partnership with PEAK growing to 70 students at the end of the plan
- Average outside scholarship of \$3,300 and increasing it by 60% of the tuition increase
- Adding a new scholarship supported by the MROF initiative starting with 20 students per year until we reach 4 classes receiving a generous scholarship in addition to other scholarships and or financial assistance.
- The Financial Assistance projections include support from the earnings on the principal of the Endowment Fund at 4% of \$750,000 annually.

### EXPENSES

#### Salaries

- Year one: 3% increase to all staff and 5% to faculty
- Years two, three and five: 3% increase to all employees
- Year four: 3% increase to all staff and 5% to faculty
- Adding four teachers along the length of the plan to support the growth of enrollment
- Adding a third counselor along the plan to cover the needs of the students as they grow.
- Adding academic support through an additional tutor and experienced personnel for those students with an IEP.

#### Benefits

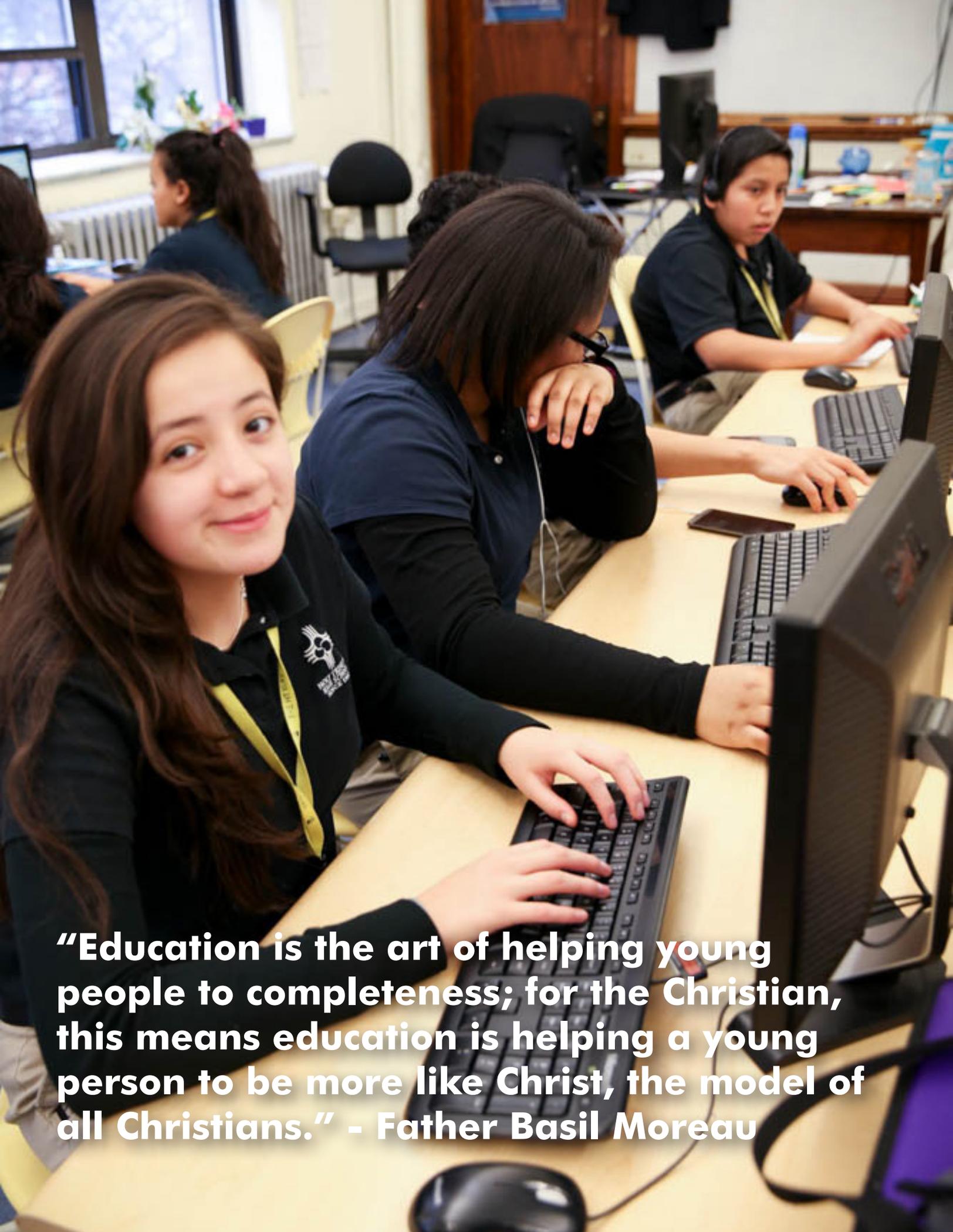
- 10% increase for health insurance and 5% for dental benefits annually.

### FUNDRAISING INCOME AND EXPENSES

- The plan contemplates a 4% growth of the main funding sources: The Fund for Holy Trinity, foundations and corporations, alumni-related activities and special events. In addition, they will grow the Hosinski Scholarship society to provide up to 55 scholarships.
- The development team is also responsible for finding resources for the academic improvements, i.e. 1:1 tech and support, and for capital improvements.
- Plan to add a new position in the second year of the plan.

### FIXED COST

- Increases to fix cost according to historical numbers, cost of living increase and enrollment growth.



**“Education is the art of helping young people to completeness; for the Christian, this means education is helping a young person to be more like Christ, the model of all Christians.” - Father Basil Moreau**